

## Backup Pro – Admin / Reseller Manual

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# 1 General Information

## 1.1 Introduction

This manual explains how Backup Pro accounts can be created and managed. Furthermore it shows the way new client settings can be deployed to Backup Pro Clients and which permission roles can be assigned to Backup Pro accounts.

## 1.2 To who is this manual dedicated?

This manual is dedicated to Resellers of the Backup Pro service and to System Administrators who manage and deploy the Backup Pro service within their company.

Information provided for:

- Self-provisioning of new customers (as a Reseller)
- Easy and controlled deployment
- Automatic reporting capabilities
- Central management and monitoring

## 1.3 Login to administration website

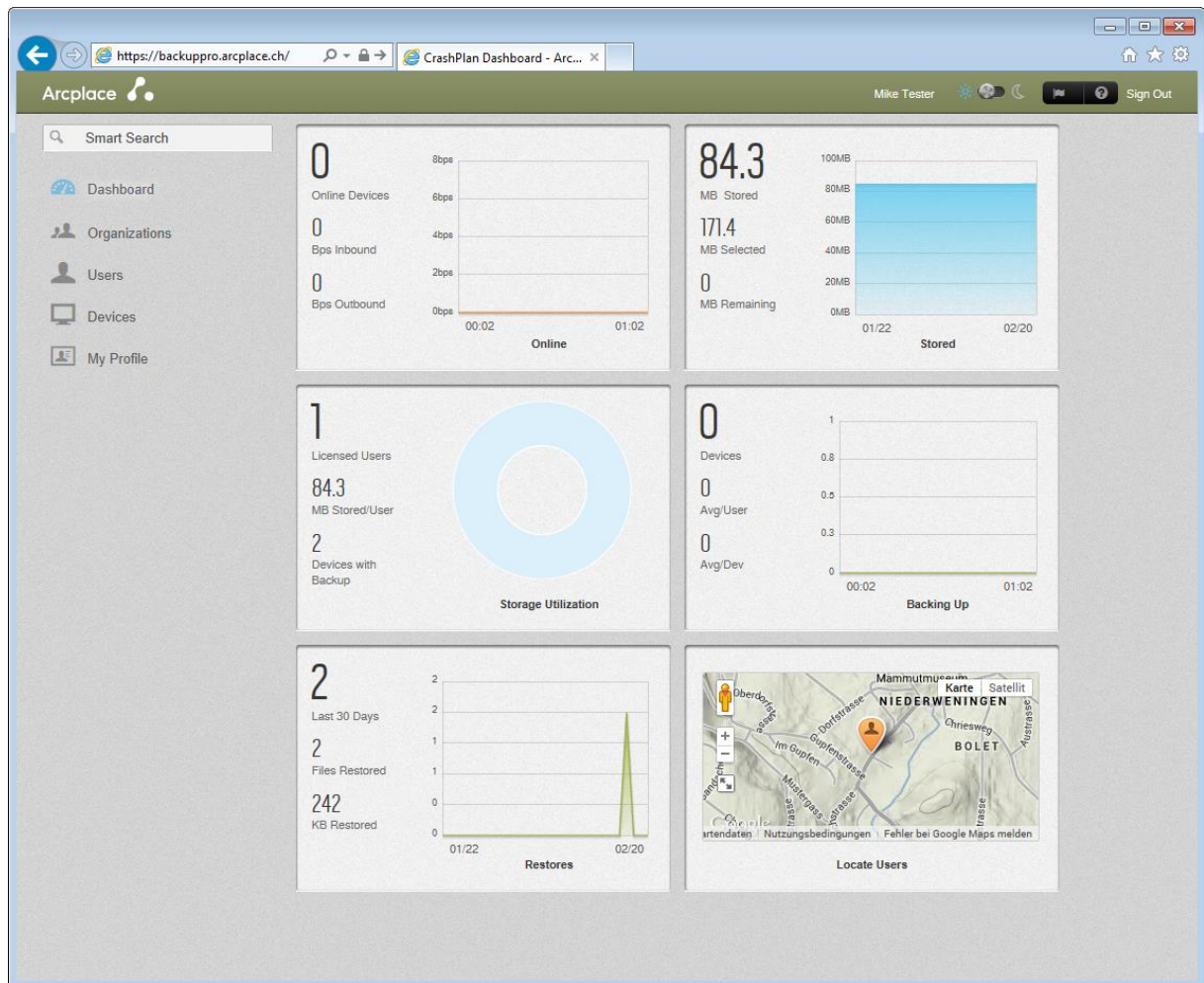
You can manage all settings through a web site by an internet browser. Please open your browser (IE, Firefox etc.) with the address <https://backuppro.arcplace.ch> and login with your Backup Pro account (administrator rights).

The manual has two parts:

1. Chapter with general admin instructions (Management of the Backup Pro Service)
2. Chapter with specific reseller instructions (Reseller)

## 2 Management of the Backup Pro Service

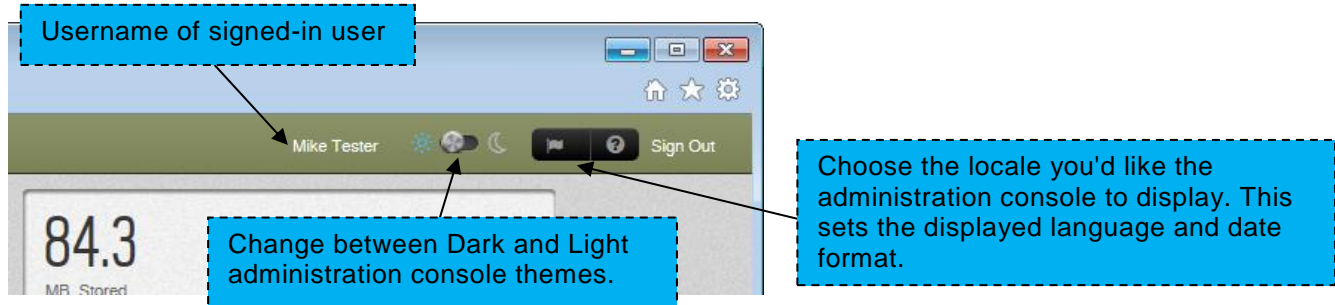
### 2.1 Overview – Dashboard



Explanation of the menus:

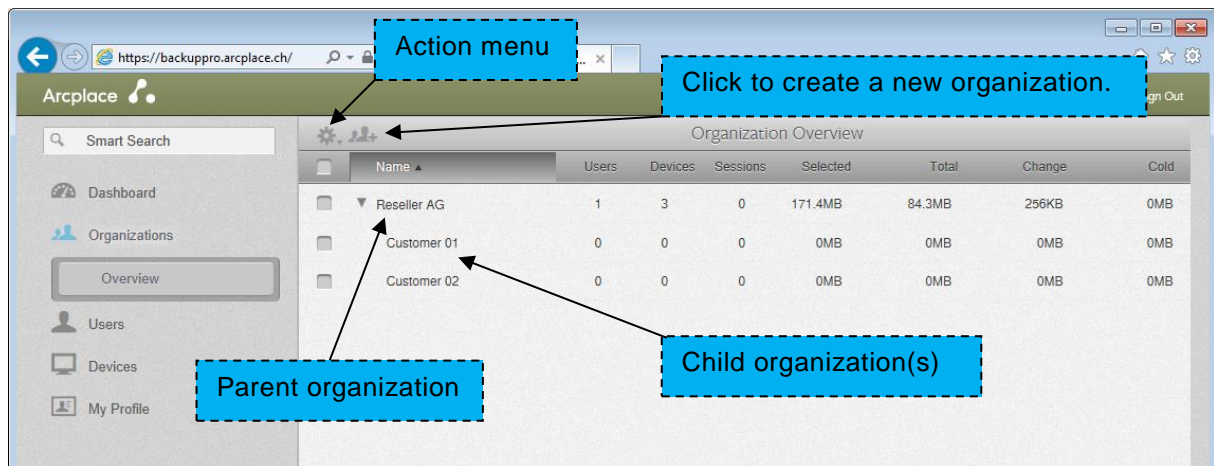
Menu	Description
Smart Search	Enter text to search for users, devices, organizations and in your environment. You can enter a full or partial first or last name, email address, device guide, device name, or organization name. Matching results appear below the search text box. Click any result to view the relevant details.
Dashboard	Displays high-level summary information about backup status, licensing, storage, and users.
Organizations	You can configure different organizations to use different settings or different backup destinations.
Users	Manage users and their devices, add new users, and manage roles.
Devices	View all devices in an organization. View and manage device details and settings.
My Profile	Displays summary information about your backup, restores and the location of your devices. The action menu contains commands to edit your profile and view deactivated devices.

### 2.1.1 Administration Console Toolbar



### 2.2 Organizations

On the Organizations page you can view a list of organizations (and child organizations) for which you are authorized. Furthermore it lets you create, modify and delete organizations and user accounts.



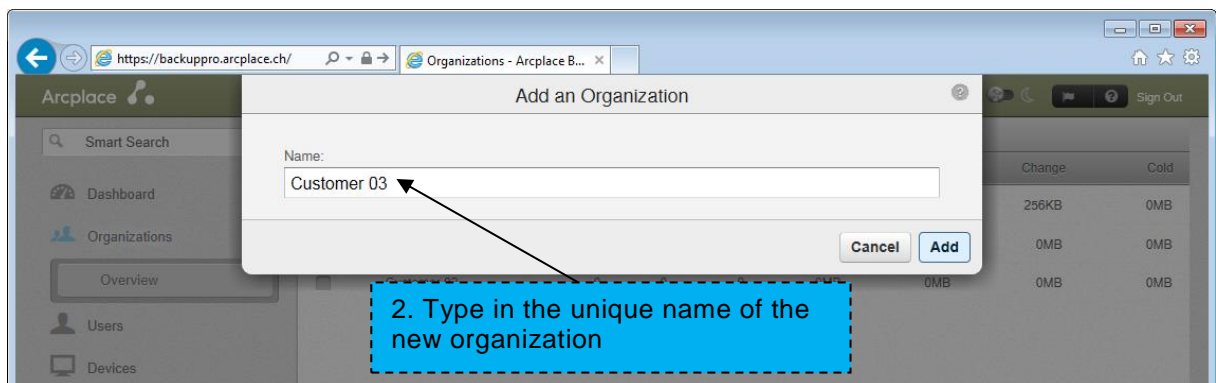
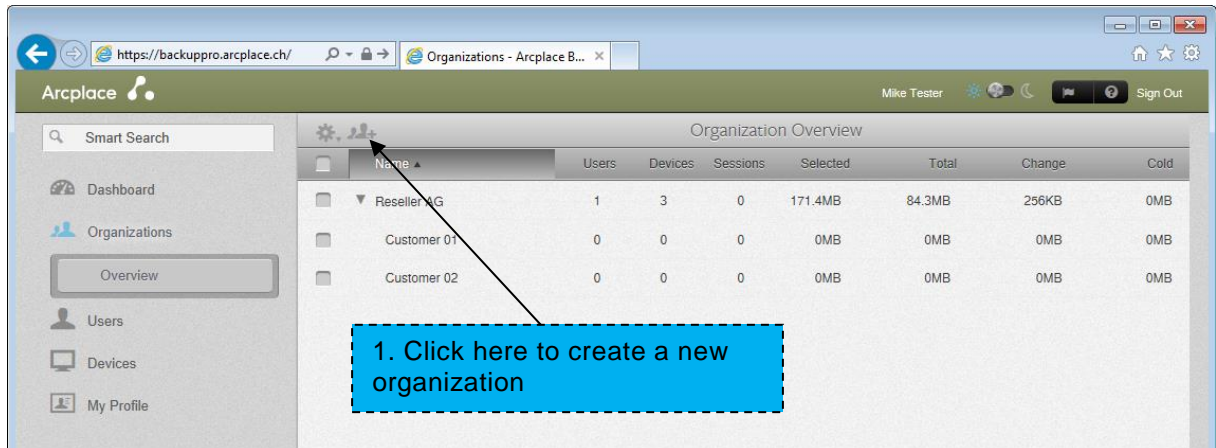
#### Organizations – Definitions:

Name	Organization name.
Users	Number of active users assigned to the organization.
Devices	Number of devices registered to users in this organization.
Sessions	Number of devices currently connected to this organization's destinations.
Selected	Total size of files selected for backup.
Total	Total amount of disk space used for backed up files.
Change	Average change in the size of backup archives per day.
Cold	Backup archives belonging to deactivated users.  <b>Important:</b> We don't offer cold storage. The backup archive of a deactivated user will be deleted during the next maintenance run (every night).

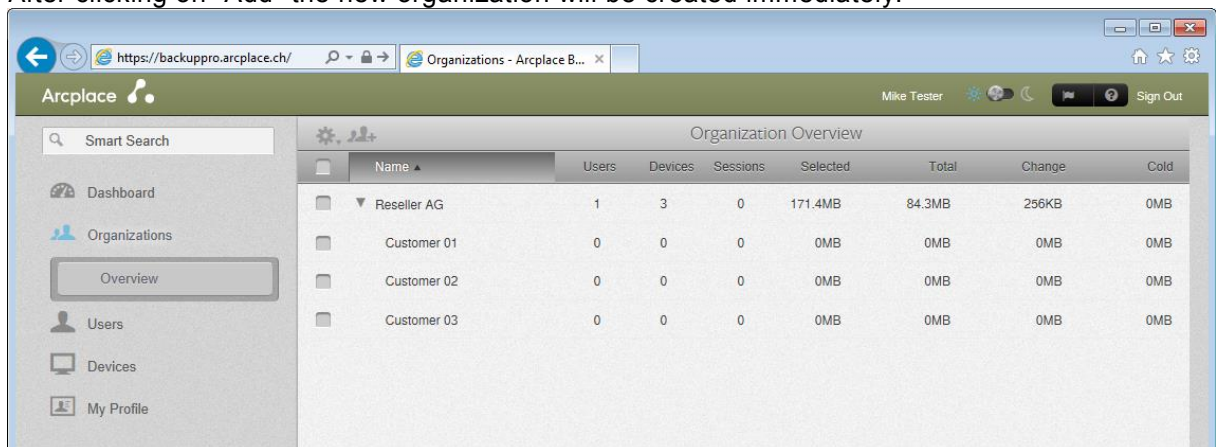
## 2.2.1 Add Organization

A new organization can be created using the menu „Organizations“. Your account with administrator rights is assigned to a parent organization, normally the name of your company. In the example below the parent organization is called „Reseller AG“. As an admin (your account) you can create new child organizations and associate user accounts to it.

In the following example a new child organization will be created. Every organization can have zero, one or several child organizations.

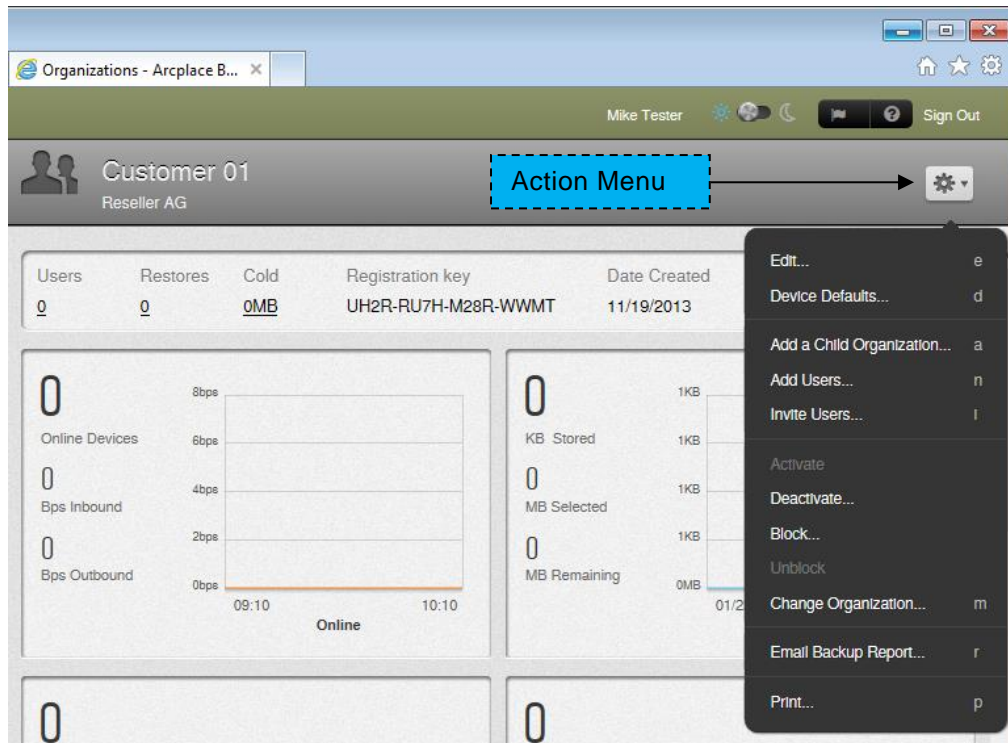


After clicking on “Add” the new organization will be created immediately:



## 2.2.2 Action Menu

If you click on the „Action Menu“ for an organization the following commands are available:

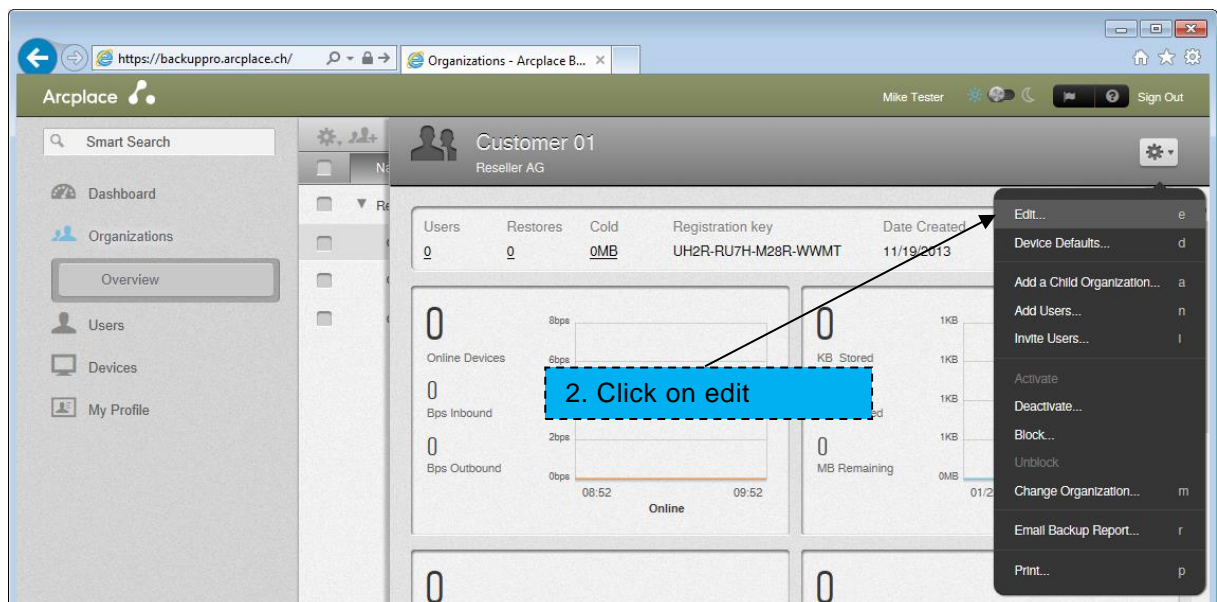
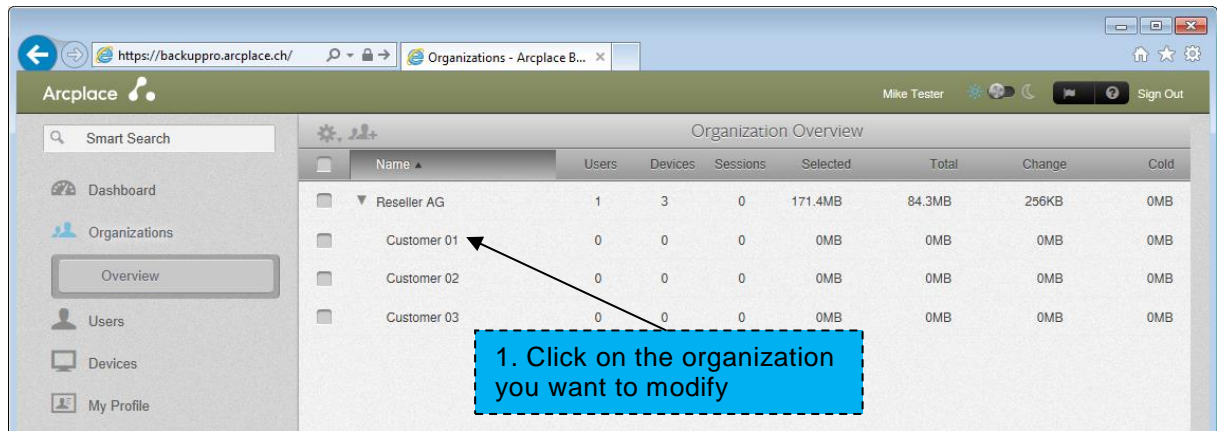


Command	Description
Edit	Edit organization settings including name, quotas and reporting.
Device Defaults	Edit default device settings for this organization.
Add a Child Organization	Add a new organization that is subordinate to the selected organization.
Add a User	Add a user to this organization.
Invite Users	Send an invitation via email to back up.
Activate	Activate a deactivated organization. Deactivated users and devices must be activated individually. This action is available when the organization has been deactivated.
Deactivate	Deactivate this organization and all associated users and devices and place all backup archives into cold storage. When an organization is deactivated, the word "deactivated" plus a timestamp is appended to the name. This action is available when the organization is active.
Block	Block this organization and all its users and devices. Backup will continue, but users within this organization will be unable to log in or restore. This action is available when the organization is not currently blocked.
Unblock	Unblock this organization and any blocked users or devices within this organization. This action is available when the organization is currently blocked.
Change Organization	Change this organization's parent organization. Settings remained unchanged when the organization's parent is changed.
Email Backup Report	Email a backup report for a specified period to organization managers or other email addresses of your choice.
Print	Creates a printable version of the organization detail sheet.

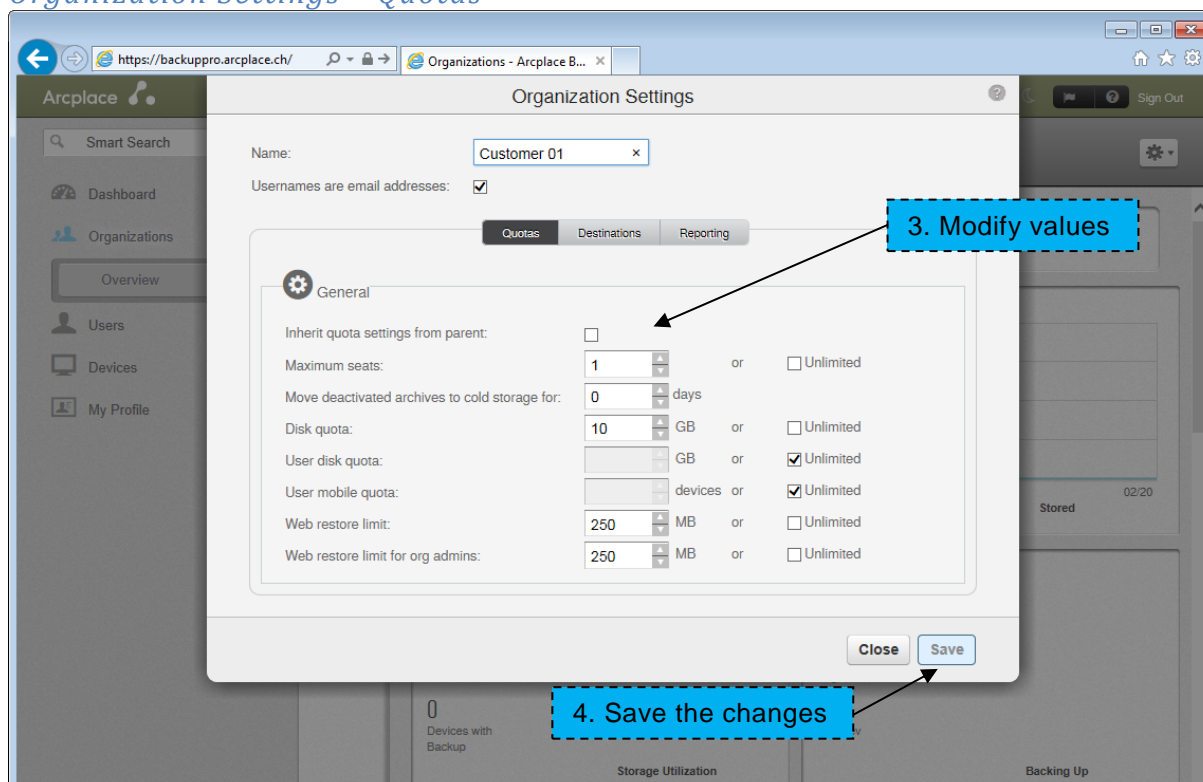
## 2.2.3 Edit an Organization

All organizations can be accessed through the menu „Organizations“. As an Admin of organizations you are able to change properties of organizations.

In the following example the child organization „Customer 01“ will be modified.

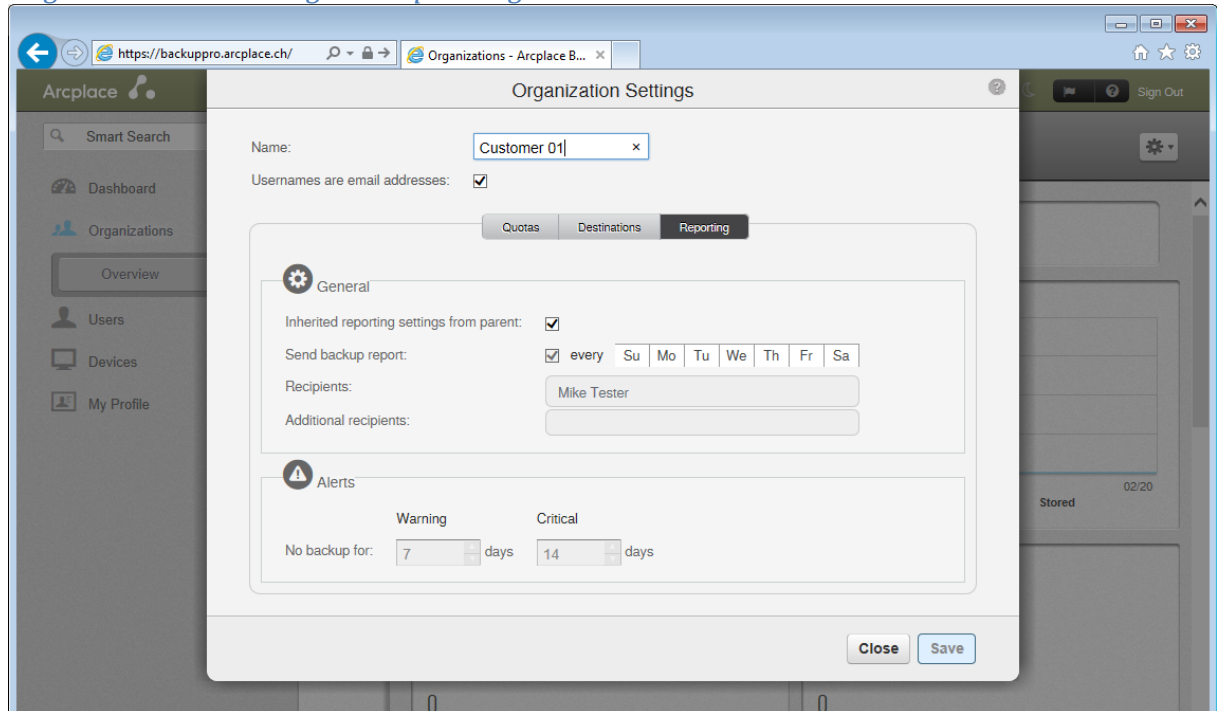


## Organization Settings – Quotas



Item	Description
Name	Name of this organization.
Usernames are email addresses	When enabled, usernames are required to be in the format of an email address. <b>We recommend keeping it untouched!</b>
Use inherited quota settings	When enabled, this organization takes on the quota settings of the organization defaults (top-level organizations) or its parent organization (child organizations) and settings must be edited at the organization default or parent organization level.
Maximum seats	The maximum number of client seat licenses allowed to be in use for this organization.
Move deactivated archives to cold storage for	Allows you to set and view the cold storage period. After this period expires, the archives will be deleted from the store point's file system.
Disk quota	The total amount of storage the entire organization is allowed to consume.
User disk quota	The total amount of storage each user is allowed to consume across all devices.
Web restore limit	The amount of data users are allowed to restore for a single web restore session.
Web restore limit for org admins	The amount of data org admins are allowed to restore during a web restore or restore to device session.

## Organization Settings – Reporting

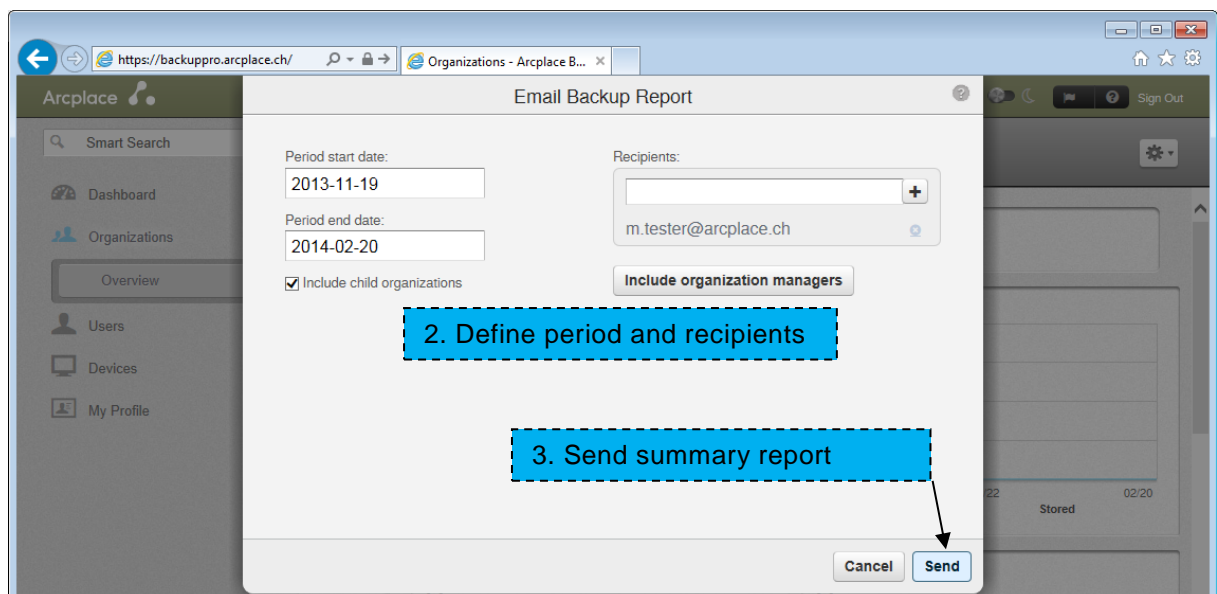
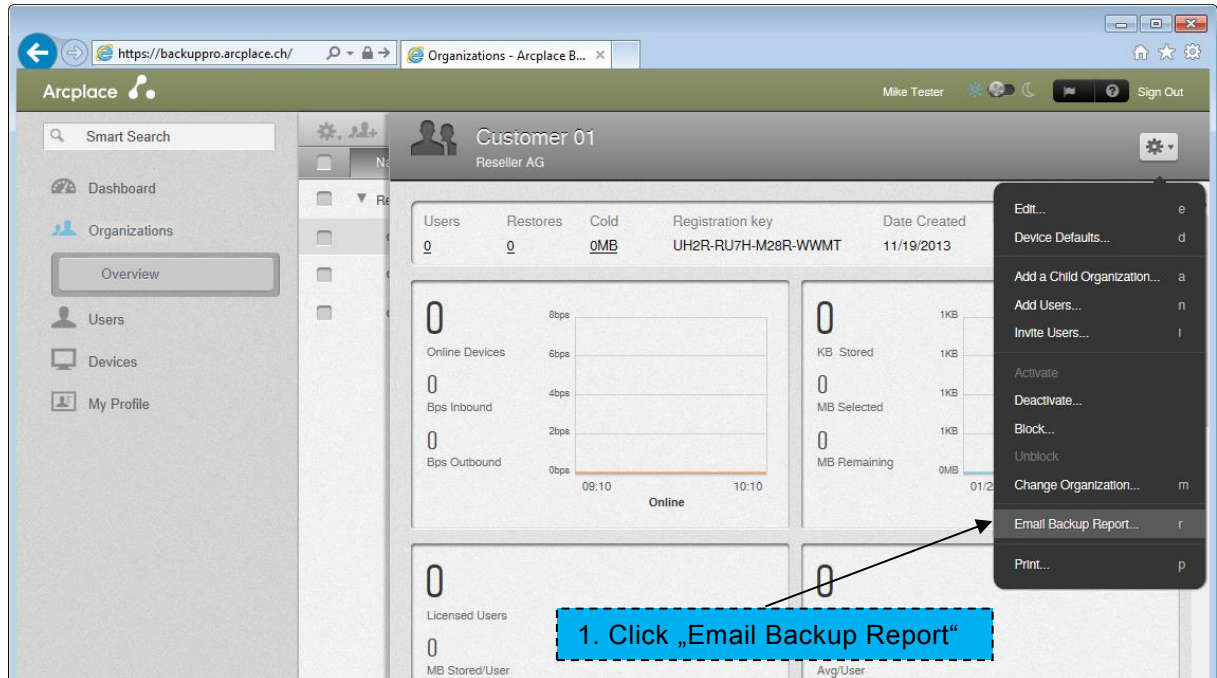


Item	Description
Use inherited reporting settings	When enabled, this organization takes on the reporting settings of the organization defaults (top-level organizations) or its parent organization (child organizations) and settings must be edited at the organization default or parent organization level.
Send backup report	Enable to send backup reports to org admins for this organization. Choose which days of the week you'd like to receive reports.
Recipients	Displays currently configured report recipients.
Additional recipients	Allows you to add or delete report recipients.
Warning	Devices that have not backed up to any destination for longer than the defined number of days are included on warning alert emails and highlighted in yellow in the admin console.
Critical	Devices that have not backed up to any destination for longer than the defined number of days are included on critical alert emails and highlighted in red in the admin console.

## 2.2.4 Email Backup Report

Backup Pro can send backup reports immediately upon request without changing the default reporting settings.

Click on „Email Backup Report“ in the action menu for the organization you want to send the report to.



Item	Description
Period start date:	Start of reporting period.
Period end date:	End of reporting period.
Include child organizations	Indicate whether or not you want child organizations included in the report.
Recipients:	Email addresses of report recipient. Click + to add email addresses to the list. Click X to remove an email address.

## 2.2.5 Default settings for Backup Pro Clients within an organization

Use the “Device Defaults” command on the Action Menu to specify default device preferences for an organization, including which files to include or exclude when backing up, plus security, network and general preferences.

The device settings are already described in the user manual and only the settings which are different will be mentioned here:

By default all client settings will be inherited from the parent organizations, but the inheritance can be disabled and custom settings can be specified. To change to custom settings please uncheck the box.

Locks this setting to prevent users from changing it in their personal settings.

Indicates whether or not a change in this setting applies to existing users in addition or new users.

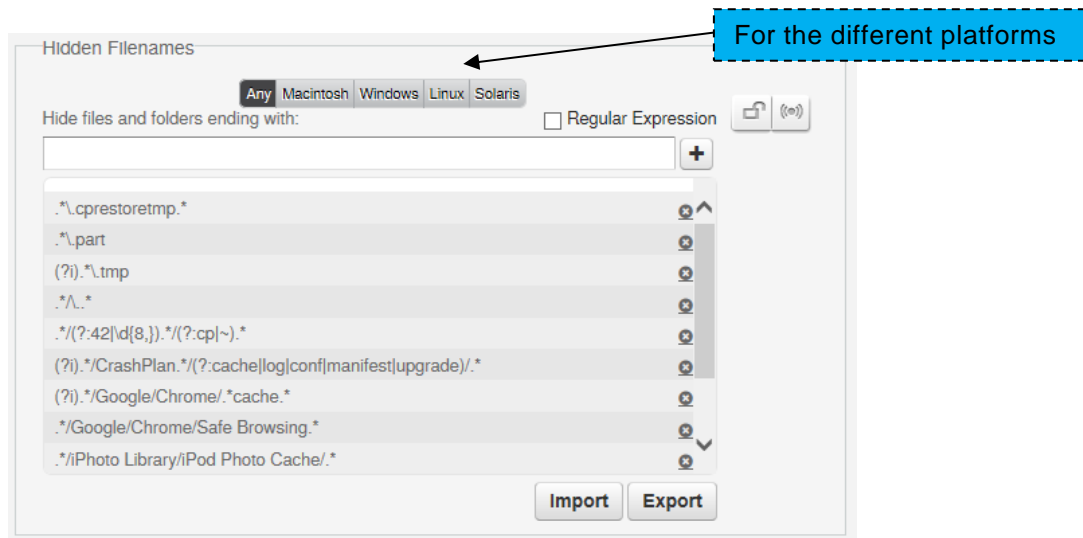
Click **Save** to save settings for new devices in the future. Saving settings does **not** affect any existing devices.

### Important note:

When updating existing, locked settings, you must unlock and relock the exclusion settings in order to apply your settings to existing archives. If you do not, new files will obey the new settings, but existing archives are not affected.

## Hidden Filenames

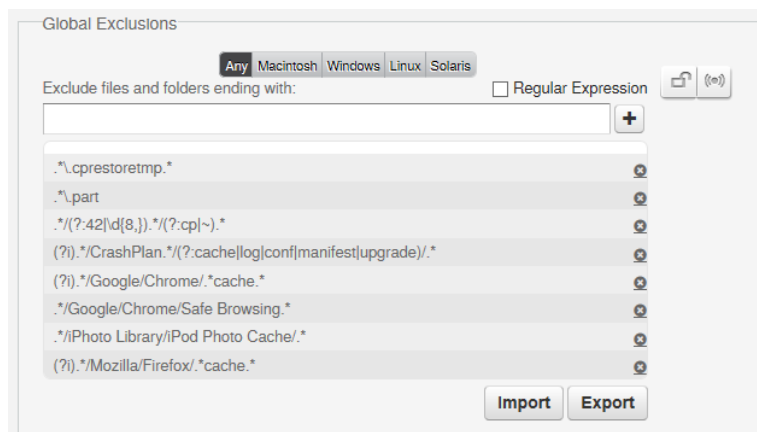
The lists of Hidden Filenames identify files that you want hidden from view in the Backup Pro app File Selection and Restore windows. Users can view hidden files by clicking the Show Hidden Files check box. You can add files to the Hidden Filenames list using filename patterns or using Regular Expressions. You can also remove items from list.



Item	Description
Regular Expression	Enter text in the form of a Regular Expression (regex).
Import	Displays window in which you can paste the contents of a text file with filename patterns / regex items you wish to exclude.
Export	Displays window in which you can copy the contents of the hidden files list, which you can in turn paste into your favorite text editor for editing

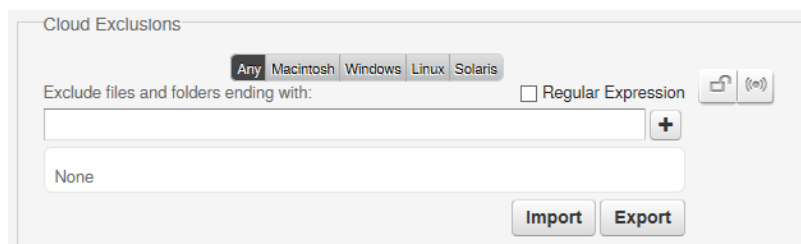
## Global Exclusions

The Global Exclusions section identifies files that you want excluded from the backup.



## Cloud Exclusions

The Cloud Exclusions section identifies files that you want excluded from backups to the cloud. Files can still be backed up to other destinations.



## 2.2.6 File Selection – Syntax

By default, Backup Pro backs up files in the document's folder of the home directory. In the path list/ directory fields on the Backup File Selection page, you can define specific files to include / exclude when backing up at an organization level.

You can use substitution variables to specify what should be included / excluded in the backup set. Those variables represent a specific folder on the system and they can be used on Windows, Mac and Linux systems.

### Important note:

Inclusions are processed first, followed by exclusions. Files that are in both the inclusions and exclusions will be **excluded**, since the exclusion list is processed last.

List of substitution variables:

Variable	Description
:main	Main volume Windows = C:\ Unix/OSX = /
:applications	Default applications folder for the device's OS (functions on all platforms) (e.g. C:\Program Files)
:user	User's home folder
:desktop	User's desktop folder
:documents	User's default document folder
:music	User's music folder
:pictures	User's pictures folder
:movies	User's movies folder
:allUsers	All installed users' home folders
:allDesktops	All installed users' desktop folders
:allDocuments	All installed users' default document folders
:allMusic	All installed users' default music folders
:allPictures	All installed users' default pictures folders
:allMovies	All installed users' default movie folders

### Examples

Included	Excluded
:user/WorkFolder/ :documents/	:user/WorkFolder/Private/

The result on Windows is:

Include	Exclude
C:\Documents and Settings\m.test\WorkFolder\ C:\Documents and Settings\m.test\Documents\	C:\Documents and Settings\m.test\WorkFolder\Private\ 

And on Mac OS X:

Include	Exclude
/Users/m.test/WorkFolder/ /Users/m.test/Documents/	/User/m.test/WorkFolder/Private/ 

## 2.2.7 File Patterns – Syntax

As File Patterns you can use regular expression, they are a powerful way of matching files to be excluded from backup. Please be aware that regular expressions are not the topic of this chapter, but we give you an example how they can be used.

### Example

The folder „Examples“ can be found at several locations on the system. These folders contain big files of the type \*.exe and should be excluded from backup set. Regular expressions provide a good solution for this scenario.

Paths to exclude:

C:\Documents and Settings\Testuser_English\AppData\Visual Studio\Examples\
C:\Program Files\Examples\

Regular expression:

(?i).*/Examples/.*.exe
------------------------

When you place this regular expression into the „File Exclusions“ section, all files in every folder with the name „Examples“ will be excluded from backup.

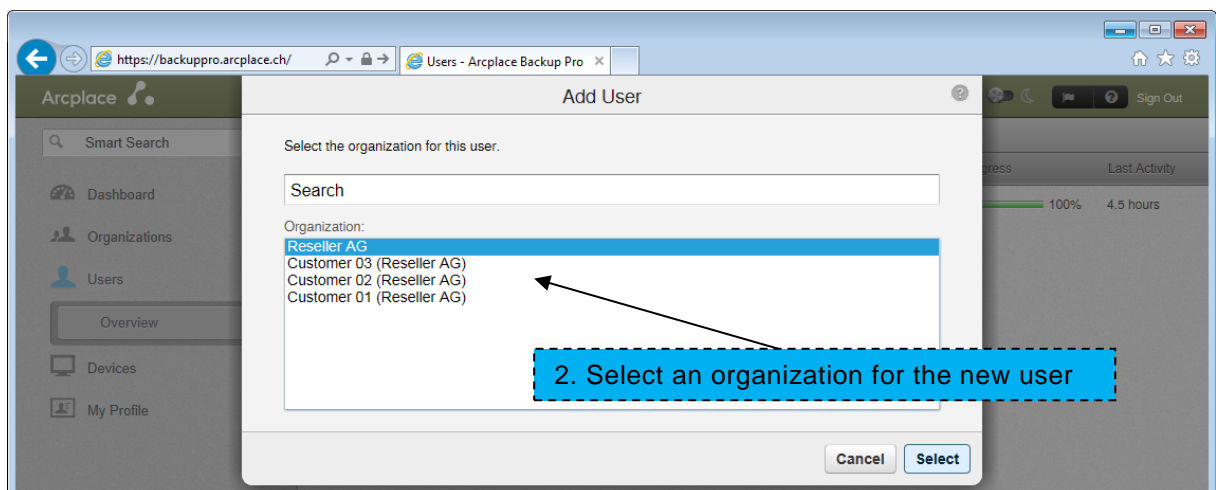
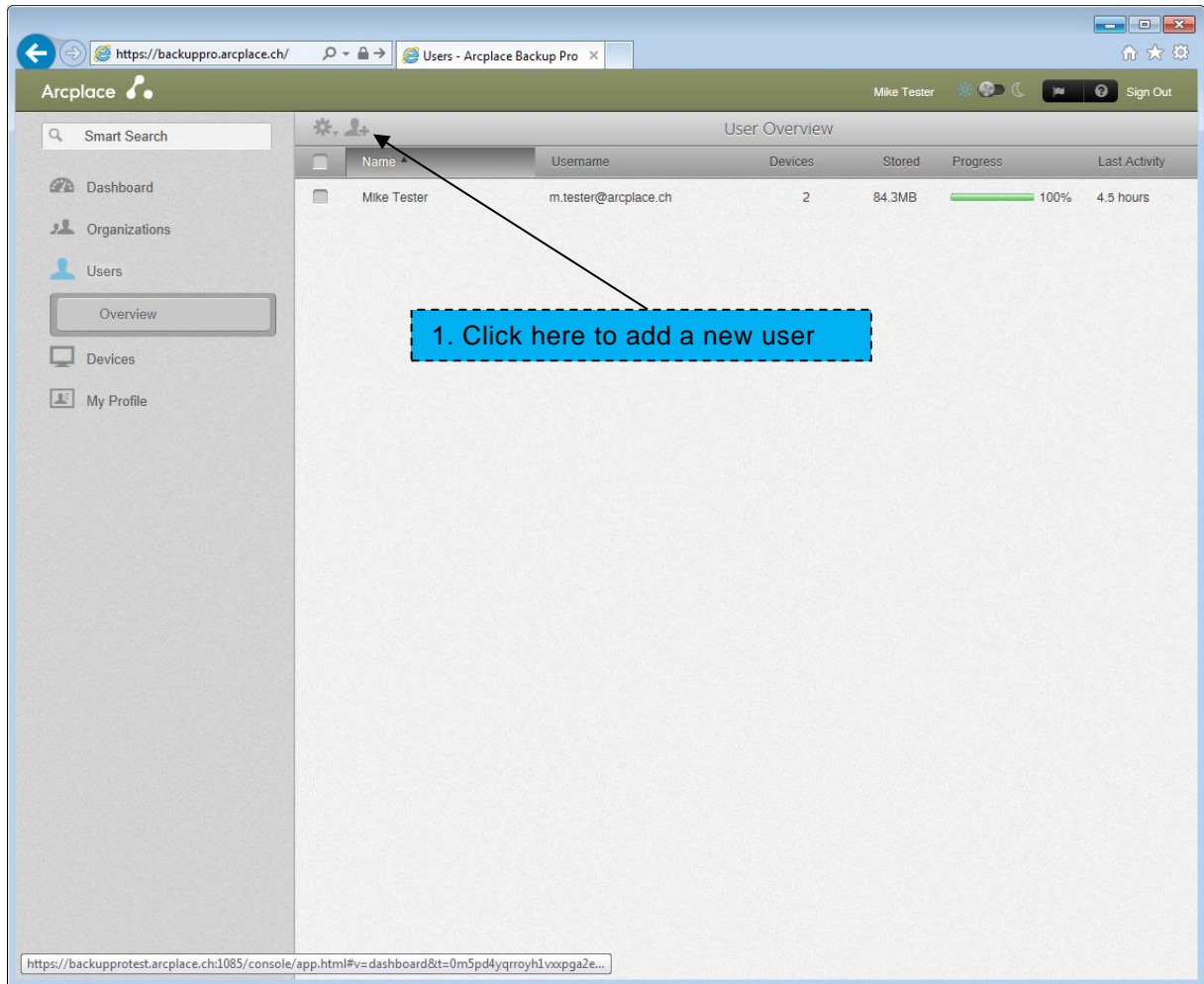
## 2.3 Users

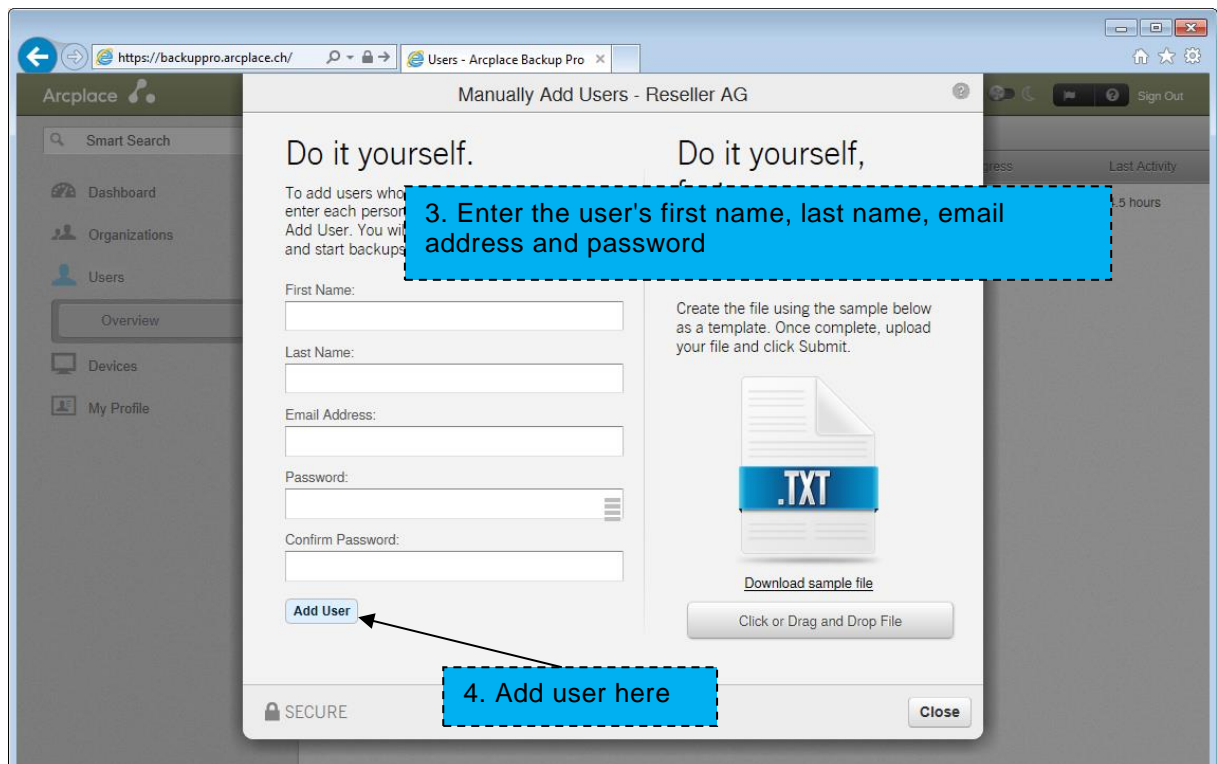
Every user is assigned to an organization. A user can be assigned to roles, which give the users access to a different set of capabilities and features.

Role	Permissions to...
Desktop User	<ul style="list-style-type: none"> <li>• Login to Client Desktop</li> <li>• Perform a personal web restore</li> <li>• Remotely browse file and directory names for personal devices. Used for remotely selecting push-restore destination and backup sources</li> </ul>
PROe User	Login to Backup Pro Management Console
Admin Restore	Permission to perform a full web restore for all devices user has authority to manage
Admin Restore Limited	Permission to perform a limited size web restore for all devices user has authority to manage
Org Help Desk	<ul style="list-style-type: none"> <li>• View computer information</li> <li>• Login to Backup Pro Management Console</li> <li>• Login to Client Desktop</li> <li>• View organization information within user's organization</li> <li>• Perform a push restore only to the source user's devices. There is no size limit</li> <li>• View user information</li> </ul>
Org Manager	<ul style="list-style-type: none"> <li>• View computer information</li> <li>• Login to Backup Pro Management Console</li> <li>• Login to Client Desktop</li> <li>• View organization information within user's organization</li> <li>• Perform a personal push restore</li> <li>• View user information</li> </ul>
Push Restore	Perform a push restore from and to any device the user has authority to manage
Org Admin	Full administrator rights for this specific organization and all sub-organizations.

### 2.3.1 Add User

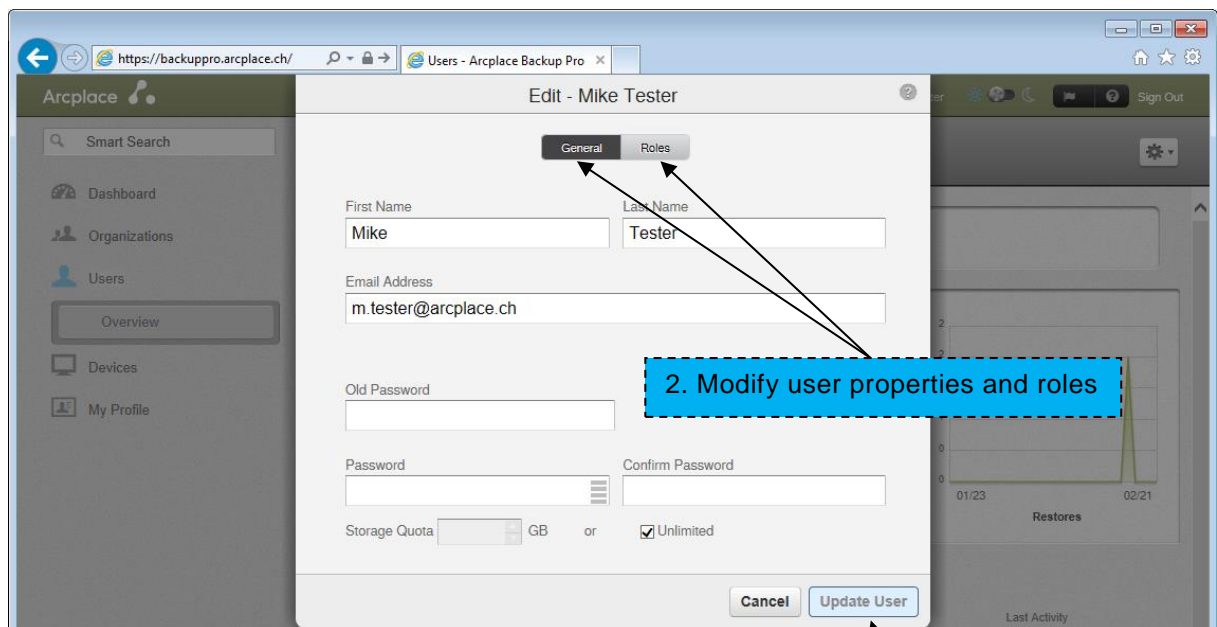
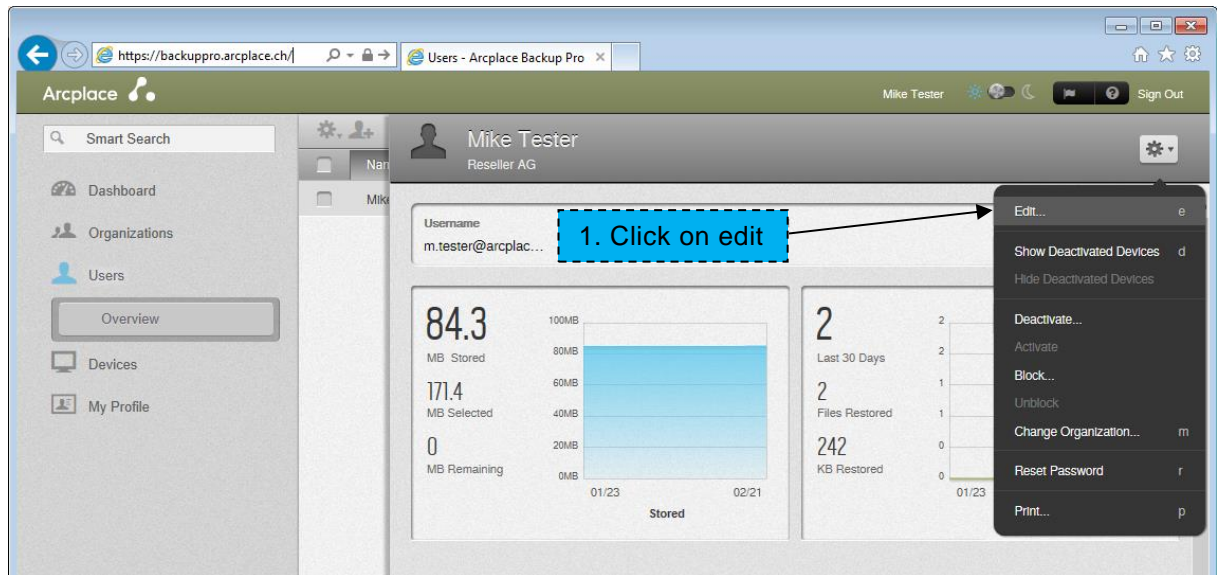
Go to the Users menu on the left and select “Add Users” to add a user assigned to this organization.





### 2.3.2 Edit User

Go to Users Menu, click on a user you want to modify and go to Edit over the action menu.



3. Save changes and close the Edit User pane.

### 3 Reseller

As reseller you can offer the Backup Pro service to your clients autonomously. In this section we provide you with the instructions to successfully provision the service for your customers.

Please be aware that when provisioning customers under your Backup Pro account, invoicing your customers and making them accept the Arcplace general terms and conditions is in your responsibility.

Steps to provision your customers:

1. Create a child organization with the name of your customer company
2. Create new client accounts (see the chapter [Add User](#))
3. Customize reporting settings of your child organization (see the chapter [Edit an organization](#))
4. Invoice your customers, for example according their storage and number of seats used

Please refer to the section “[2. Management of the Backup Pro Service](#)” for detail instructions on how to use the admin functions below.

#### 3.1 Create a child organization for your customer

Within your account you can create several child organizations, which correspond to each of your customers. As a result your child organizations are listed as in the example below.

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https://backupprotest.arcplace.ch16

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Organizations - Arcplace B... x

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Arcplace

Mike Tester

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Sign Out

🔍 Smart Search

📊 Dashboard

👤 Organizations

Overview

👤 Users

🖥️ Devices

👤 My Profile

⚙️ 👤

Organization Overview

	Name ▲	Users	Devices	Sessions	Selected	Total	Change	Cold
📁	▼ Reseller AG	1	3	0	171.4MB	84.3MB	296.5KB	0MB
📁	Customer 01	0	0	0	0MB	0MB	0MB	0MB
📁	Customer 02	0	0	0	0MB	0MB	0MB	0MB
📁	Customer 03	0	0	0	0MB	0MB	0MB	0MB

According to business needs of your customers, we recommend you to modify some of the default client settings such as file selection, retention, privileges and reporting rules.

### 3.2 Provisioning new accounts

There are two different ways to provision your customer accounts:

1. Manually by the reseller using an existing account  
This method allows you to pre-create certain customer accounts and manage all account details of each client like email, password and such by yourself. The advantage with this variant is that you have full control over the account details of each account used by your customers.

Please perform the following actions when you are on your customer client:

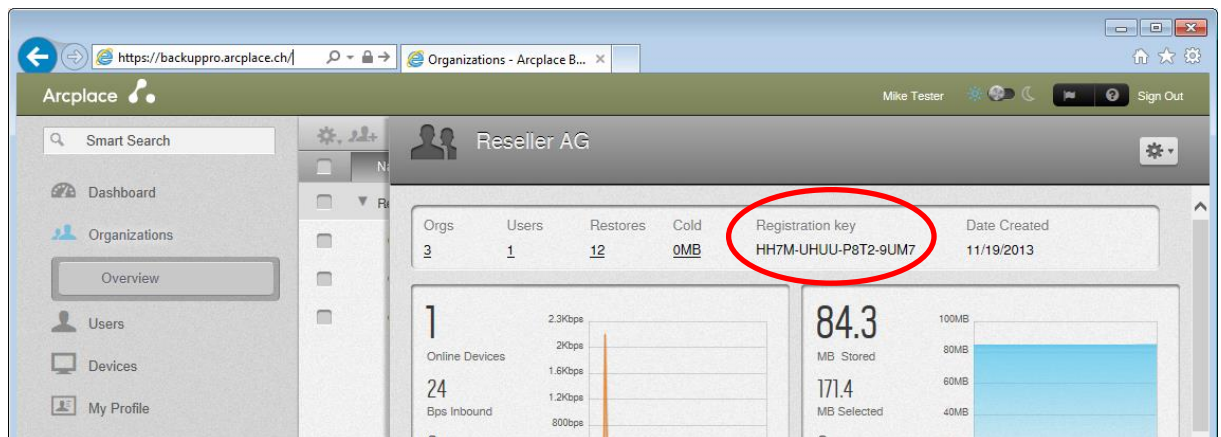
1. Download and install the Backup Pro software
2. Sign-in using “Existing Account”

2. Through your customer using the self-registration feature  
This method allows your customers to self-register their accounts, so you won't have to create each account manually. Each organization has a unique registration key, which allows customers to create their own accounts.

Please perform the following actions when you are on your customer client:

1. Download and install the Backup Pro software
2. Register an account using “New Account” and the organization registration key

→ You will find the registration key if you go to the Organizations menu and click on the specific organization (see below).



URLs to download the installers and the manuals of Backup Pro:

- Software:  
[https://www.arcplace.ch/fileadmin/user\\_upload/downloads/BackupPro\\_Software.pdf](https://www.arcplace.ch/fileadmin/user_upload/downloads/BackupPro_Software.pdf)
- Manuals:  
[https://www.arcplace.ch/fileadmin/user\\_upload/downloads/BackupPro\\_Documentation.pdf](https://www.arcplace.ch/fileadmin/user_upload/downloads/BackupPro_Documentation.pdf)

### 3.3 Customize reporting settings

Each of your child organizations (customers) can have individual reporting & alerting settings. Be aware that all user accounts, which have the “Manager” role assigned, will get the reporting summary email over all accounts by default.

For details please refer to the chapter [Add Organization](#).